



**RFP # 6029 Z1**

State of Nebraska State Purchasing Bureau  
REQUEST FOR PROPOSAL FOR EMS SERVICES LEADERSHIP  
AND SUPERVISOR TRAINING  
Original

Paul Metler  
Vice President of Content Development  
110 S Adams St  
Green Bay, WI 54301  
Phone: (865) 755-0809  
Email: [pmetler@initiative-one.com](mailto:pmetler@initiative-one.com)  
[www.initiative-one.com](http://www.initiative-one.com)

April 10, 2019

Annette Walton / Nancy Storant  
State Purchasing Bureau  
1526 K Street, Suite 130  
Lincoln, NE 68508

Dear Members of the Selection Committee,

FWJ Inc. d/b/a InitiativeOne is pleased to submit our response to RFP #6029 Z1, EMS Training. For nearly twenty years, InitiativeOne has been providing these services, helping businesses, organizations, educators and agencies improve the leadership ability to their staff, and in so doing, improve their business model and results.

In 1999, with McDonald's Corporation as its first client, InitiativeOne began transforming leaders and their organizations, helping them foster high impact work cultures defined by authenticity, transparency, safe environments and deep respect.

Many companies now look at InitiativeOne's roster of clients and see highly recognizable names. But these represent only a small segment of the business, healthcare and academic cultures that have been transformed after engaging InitiativeOne. Size, geography and industry all take a backseat to one thing — if you lead a community of people who must work together, InitiativeOne can help you foster a results-driven culture.

InitiativeOne takes no exceptions to the terms and conditions of the RFP. We acknowledge Addendum 1 issued March 25, 2019 and Addendum 2 issued March 27, 2019. We look forward to helping the State of Nebraska achieve this leadership transformation and cultural shift by providing Emergency Medical Services Leadership and Supervisor Training to provide the State's EMS agencies with tools and skills needed to operate an EMS at maximum capability.

Sincerely,



Paul Metler, Ph.D.  
Vice President of Content Development  
110 S Adams St  
Green Bay, WI 54301  
Phone: (865) 755-0809  
Email: [pmetler@initiative-one.com](mailto:pmetler@initiative-one.com)  
[www.initiative-one.com](http://www.initiative-one.com)

## Table of Contents

Bidder Contact Sheet.....	4
Request for Proposal for Contractual Services.....	6
Corporate Overview .....	8
a. Bidder Identification And Information .....	8
b. Financial Statements .....	8
c. Change Of Ownership.....	9
d. Office Location .....	9
e. Relationships With The State .....	9
f. Bidder's Employee Relations To State.....	9
g. Contract Performance .....	9
h. Summary Of Bidder's Corporate Experience.....	9
Project 1 - Wauwatosa Public School District .....	9
Project 2 - Leadership Transformation for Faith-Based Leaders.....	12
Project 3 - Henry County Public School District .....	15
i. Summary Of Bidder's Proposed Personnel/Management Approach .....	16
Reporting Structure.....	16
j. Subcontractors .....	0
Sections II through IV .....	1
Section V.....	13
F. Bidder Requirements.....	13
EMS Leadership Training.....	13
Preparation for Volunteers .....	17
Shrinking Volunteers and High Attrition Rates .....	18
Resources for Participants.....	19
State Cost Proposal .....	21

## Bidder Contact Sheet

---

*A completed Bidder Contact Sheet follows this page.*

---

**Form A**  
**Bidder Contact Sheet**  
**Request for Proposal Number 6029 Z1**

Form A should be completed and submitted with each response to this RFP. This is intended to provide the State with information on the bidder's name and address, and the specific person(s) who are responsible for preparation of the bidder's response.

Preparation of Response Contact Information	
Bidder Name:	FWJ Inc.
Bidder Address:	110 S Adams St, Green Bay, WI 54301
Contact Person & Title:	Paul Metler, Vice President of Content Development
E-mail Address:	pmetler@initiative-one.com
Telephone Number (Office):	(865) 755-0809
Telephone Number (Cellular):	(865) 755-0809
Fax Number:	NA

Each bidder should also designate a specific contact person who will be responsible for responding to the State if any clarifications of the bidder's response should become necessary. This will also be the person who the State contacts to set up a presentation/demonstration, if required.

Communication with the State Contact Information	
Bidder Name:	FWJ Inc.
Bidder Address:	110 S Adams St, Green Bay, WI 54301
Contact Person & Title:	Paul Metler, Vice President of Content Development
E-mail Address:	pmetler@initiative-one.com
Telephone Number (Office):	(865) 755-0809
Telephone Number (Cellular):	(865) 755-0809
Fax Number:	NA

*PM*  
3/22/2019



## Request for Proposal for Contractual Services

---

*A completed Request for Proposal for Contractual Services Form follows this page.*

---

## REQUEST FOR PROPOSAL FOR CONTRACTUAL SERVICES FORM

### BIDDER MUST COMPLETE THE FOLLOWING

By signing this Request for Proposal for Contractual Services form, the bidder guarantees compliance with the procedures stated in this Request for Proposal, and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder maintains a drug free work place.

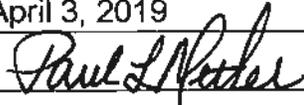
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603 DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Contractors. This information is for statistical purposes only and will not be considered for contract award purposes.

\_\_\_\_\_ NEBRASKA CONTRACTOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Contractor. "Nebraska Contractor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this RFP.

\_\_\_\_\_ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

\_\_\_\_\_ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. §71-8611 and wish to have preference considered in the award of this contract.

### FORM MUST BE SIGNED USING AN INDELIBLE METHOD (NOT ELECTRONICALLY)

FIRM:	FWJ Inc.
COMPLETE ADDRESS:	110 S Adams St, Green Bay, WI 54301
TELEPHONE NUMBER:	(856) 755-0809
FAX NUMBER:	NA
DATE:	April 3, 2019
SIGNATURE:	
TYPED NAME & TITLE OF SIGNER:	Paul Metler, Vice President of Content Development

*Original Signature*

**REQUEST FOR PROPOSAL FOR CONTRACTUAL SERVICES FORM**

**BIDDER MUST COMPLETE THE FOLLOWING**

By signing this Request for Proposal for Contractual Services form, the bidder guarantees compliance with the procedures stated in this Request for Proposal, and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder maintains a drug free work place.

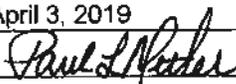
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603 DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Contractors. This information is for statistical purposes only and will not be considered for contract award purposes.

\_\_\_\_ NEBRASKA CONTRACTOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Contractor. "Nebraska Contractor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this RFP.

\_\_\_\_ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

\_\_\_\_ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. §71-8611 and wish to have preference considered in the award of this contract.

**FORM MUST BE SIGNED USING AN INDELIBLE METHOD (NOT ELECTRONICALLY)**

FIRM:	FWJ Inc.
COMPLETE ADDRESS:	110 S Adams St, Green Bay, WI 54301
TELEPHONE NUMBER:	(856) 755-0809
FAX NUMBER:	NA
DATE:	April 3, 2019
SIGNATURE:	
TYPED NAME & TITLE OF SIGNER:	Paul Metler, Vice President of Content Development

*Copy Signature*

## Corporate Overview

### a. Bidder Identification And Information

FWJ Inc. d/b/a InitiativeOne is headquartered at 110 South Adams Street, Green Bay, WI 54301. It was incorporated in 1999 and has not changed ownership or names since its inception.

### b. Financial Statements

A copy of InitiativeOne's financial and credit recommendation follows at the end of this proposal.

Since 1999, InitiativeOne's team has engaged with a diverse group of clients—from small businesses with fewer than 20 employees to multinational corporations employing over 100,000 people. Clients include Banner Health, Beck Aluminum, Brenengen Auto, GEA Farm Technologies, HonorHealth, Festival Foods, McDonnell Douglas Aerospace, MetalFlow, Realty Executives International, Oneida, NFL teams, PGT Innovations, US Steel, The University of Wisconsin, and WSI Supply Chain Solutions. InitiativeOne has provided services throughout North America, Europe, and South America. Currently, North America is the primary target market.

InitiativeOne instructors are vetted through an extensive process to identify, train, evaluate, and certify team members who align with the core values and deliver process excellence. Prospective instructors undergo a qualifying Interview and a Professional Dynametric Programs ProScan assessment. Approved candidates experience the Leadership Transformation Process as participants, complete a second interview with InitiativeOne team members and enter into training for certification. InitiativeOne utilizes a vast business network, including web presence, to identify prospective team members.

Instructors possess diverse professional experience, certifications, and memberships including Professional Dynametric Programs, Situational Leadership II, Covey Leadership Training, The Table Group, Certified Human Behavioral Consulting, Leadership Institute of America, Certified Civil and Family Mediation, American Society for Training and Development, International Society for Performance Improvement, American Bar Association, and InitiativeOne Leadership Transformation Facilitator Certification. InitiativeOne's master instructors deliver InitiativeOne proprietary Leadership Transformation and many other integrated consulting products and courses listed below.

InitiativeOne is committed to fiscal responsibility and financial integrity. InitiativeOne CFO, Tracy Felmer Johnson provides oversight of all financial processes and bookkeeping functions. Her responsibilities include coordination of InitiativeOne's relationship and Line of Credit with Bank of Little Chute (BLLC), accounting with CPA, Tammy L. Bues of Pinnacle Consulting Group, LLC. InitiativeOne's advisory board provides an additional layer of expertise and accountability.

### References

Kendra A. Anderson  
Vice President Commercial Leading  
BLC Community Bank  
206 E. Main Street  
Little Chute, Wisconsin 54140  
(920) 788 -4141

Tammy L. Bues, CPA  
Pinnacle Consulting Group, LLC.  
1809 Deckner Avenue, Suite A  
Green Bay, Wisconsin 54302  
(920) 406-9628

c. **Change Of Ownership**

InitiativeOne does not anticipate a change of ownership in twelve (12) months following the proposal due date. If one were to happen, however, we understand that notification to the State is required.

d. **Office Location**

FWJ Inc. d/b/a InitiativeOne  
110 South Adams Street  
Green Bay, WI 54301

e. **Relationships With The State**

InitiativeOne has no past or present dealings with the State within the last two (2) years.

f. **Bidder's Employee Relations To State**

InitiativeOne has no employees with past or present relations to the State.

g. **Contract Performance**

InitiativeOne has not had a contract terminated for default during the last two (2) years. If a termination due to default were to have occurred, we understand that we must submit full detail of the termination.

h. **Summary Of Bidder's Corporate Experience**

Project 1 - Wauwatosa Public School District

**Leadership Development: Insourcing Train the Trainer Program**

*Relevance to RFP*

InitiativeOne's work with Wauwatosa Public School District demonstrates the following relevant experience:

- Commitment to increase leadership capacity within the organizations. We help organizations develop bench strength and capacity to reproduce high impact leaders with the organization without creating a dependence on InitiativeOne. We successfully transfer ownership and accountability for leadership development to leaders within the organization.
- Commitment to sustainability - We train internal trainers to sustain positive change. This is a non-negotiable for creating momentum that will carry the organization forward beyond a training event.
- Key models created a common language within the organization for accelerating and leading positive change.
- Experience with leaders who interface and lead diverse stakeholders in a highly visible community context - Educational leadership requires skills for interaction with employees, volunteers and the greater community.
- Experience with crisis leadership capacity - Educational leaders must be prepared to respond quickly and decisively in times of crisis.

**Wauwatosa Public School District: Wauwatosa, Wisconsin**

- a. Time period: July 31, 2018 - August 2, 2019
- b. Training was completed.
- c. Delivery within the organization by the trainers is ongoing.

- d. Contact: Dr. Phil Ertl, Superintendent, Phone: (414) 773-1010, Email: [ertph@wauwatosa.k12.wi.us](mailto:ertph@wauwatosa.k12.wi.us)
- e. All project work was performed by InitiativeOne as Prime Contractor.

### *Narrative Description of Project*

InitiativeOne provided an Insourcing, and Internal Enterprise Training process as a human capital strategy. This is a system-wide application which involved direct HR management consulting, change management, and HR process improvement with respect to leadership development throughout the organization. The InitiativeOne Insourcing process engaged and energized Wauwatosa School District leaders. This strategic process brought together individuals with a wide range of similarities and differences and prepared them to deliver the InitiativeOne curriculum to departments and within buildings throughout the district.

The Insourcing process provided a practical strategy for fostering an environment of involvement, healthy communication, fairness, and respect. The Insourcing process equipped employees for embracing innovation, change management, and improvement in organizational effectiveness. Five Wauwatosa School District leaders were trained and certified by InitiativeOne. The training took place over three days at InitiativeOne's corporate office located at 110 South Adams Street, Green Bay, Wisconsin 54301 and included customized materials specific to the organization. The internal facilitators were required to have completed the nine-week Leadership Transformation Process. Internal facilitators were certified to deliver five modules:

1. Module One: Creating an Environment of Positive Accountability
2. Module Two: Leading for Maximum Impact
3. Module Three: Innovation and the Reality of Change
4. Module Four: Understanding People in the Organization
5. Module Five: Accelerating a Problem-solving Culture

Insourcing proceeded with the following objectives:

- (1) Create a system wide approach to decision making and prioritization,
- (2) Accelerate speed and depth of cultural leadership throughout the organization,
- (3) Drive common language, key principles, and expectations, and
- (4) Deliver Leadership Transformation in a scalable and cost-effective way.

Wauwatosa identified key leaders who would become certified Insourcing trainers. Internal Enterprise Training included five, ninety-minute sessions facilitated by internal facilitators. The most critical key models are delivered by Dr. Fred Johnson through professionally recorded video presentations. Teams will be introduced to expectations such as accountability, team norms, problem solving, proactive decision-making, and other behavior and practices necessary for high-performing and healthy organizations.

### **Methodology, tools, and/or processes utilized in performing the work.**

#### *Insourcing: Internal Enterprise Training Process*

Dr. Fred Johnson, CEO, and Tracy Johnson, COO, and Dr. Paul Metler, Vice President of Content Development facilitated the Insourcing Facilitator Training. Wauwatosa Internal Facilitators received a Facilitator manual and a participant manual and access to video presentations of each instructional model for Insourcing.

### Six Instructional Models for Insourcing:

**Model One:** The Decision Frame - This model provides a framework for objective, consistent decision making based upon purpose and strategy rather than emotional drama and noise.

**Model Two:** Pareto's Principle - This model provides a framework that will enable you to say "Yes" to intentionality and purpose and "No" to over-commitment, distractions and unproductive busyness.

**Model Three:** The Reality of Change – This model teaches leaders how to break free from the status quo, make a real commitment for positive change and sustain momentum toward your personal vision and critical goals and you will learn how to anticipate and overcome the barriers to success.

**Model Four:** The People Pyramid - This model reveals how make the best investment of time in people, leverage the right people to create strategic momentum and neutralize naysayer behavior in your organization.

**Model Five:** Taking 100% Responsibility - This model teaches how and why the best leaders take 100% responsibility for their lives and how victim thinking thwarts leadership transformation.

**Model Six:** Responding in Real Time - This model provides a simple process that will enable leaders to provide a timely and thoughtful response to personal conflict rather than an emotional reactionary response.

Training followed the schedule as outlined below:

Wauwatosa Facilitators completed the Insourcing Facilitator Training prior to delivering the Insourcing content to internal leaders within the Wauwatosa School District.

The following professional standards and expectations are included in the Insourcing Facilitator Training:

1. **Model** the way.
  - Set a good example through preparation, authenticity and delivery.
2. **Engage** the participants.
  - You are responsible for creating an environment that will be conducive for the best possible experience.
  - Setting Team Norms in Session One will be a foundational learning experience for the group that will provide for active learning.
3. **Create** a practice field.
  - Think beyond the sessions. Consider how the sessions can become a catalyst for positive change outside the training time and lead the participants to a future orientation of transformation. Help participants learn how to operationalize new behaviors and best practices throughout the week. Each session should serve to spark interest in continued learning beyond the ninety minutes.

## Project 2 - Leadership Transformation for Faith-Based Leaders

### *Relevance to RFP*

InitiativeOne's Leadership Transformation Process for Faith-Based Leaders demonstrates the following relevant experience:

- Experience with leaders who interface and lead diverse stakeholders in a highly visible community context - The faith-based leaders face the challenges of recruiting, mobilizing, and retaining volunteers.
- Experience with core critical leadership questions with faith-based leaders that provide depth and relevant experience for work with EMS leadership challenges:
  - Critical Question 1: How do faith-based leaders develop and practice setting healthy boundaries? Leaders need a basis for saying "yes" and "no" when they are bombarded with requests that stretch them beyond their spiritual, emotional and physical capacity. Our research revealed the following characteristics of faith-based leadership:
    - Invest an extraordinary amount of time and energy in their work.
    - Feel strong emotions around their work.
    - Experience any perceived failures as devastating
  - Critical Question 2: Can you separate your core identity from your work? Without a clear sense of identity, faith-based leaders seek affirmation of their value from what they do rather than who they are. When this happens, faith-based leadership is based on "doing" rather than "being." When faith-based leaders perceive failures as devastating it is typically because they internalize failures. A fear of fear hinders personal leadership development and the capacity to develop other leaders.
  - Critical Question 3: How do Faith-Based leaders develop emotional intelligence? Healthy leaders fortify their ability to transform setbacks into learning experiences. What happens when negative messaging plays in the inner theatre? When a fear of failure becomes prevalent, faith-based leaders begin to attach worth, significance and leadership influence with a perfect record. Mistakes rock their world. This type of belief system leads to behaviors that sabotage credibility. A fear of failure begins to shape decision-making, communication and relationships.
- Experience with crisis leadership capacity - Faith-based leaders respond with counsel, comfort and care to crisis situations.

### **Faith-Based Leaders Leadership Transformation**

- a. Time Period: February 7, 2017 - March 20, 2018
- b. Project scheduled and completed: February 7, 2017 - March 20, 2018
- c. Deliver leadership transformation training
- d. Contact: Joshua Ratliff, Phone: (864) 280-4895, Email: [pastorjosh@welcomewesleyan.com](mailto:pastorjosh@welcomewesleyan.com)
- e. All project work was performed by InitiativeOne as Prime Contractor.

### *Narrative Description of Project*

The InitiativeOne Leadership Transformation Process for Faith-Based Leaders provided a powerful group process led by a highly skilled facilitator. Leaders experienced best practice methodology within real world challenges which were directly applied in their own specific leadership context. The group process contained four components:

1. Compelling cognitive learning.
2. Group facilitation while navigating real world challenges.
3. Strategic personal discovery inventory.
4. State of the art practical “toolkit” development for leadership in today’s culture.

### **The process was delivered in 2 Phases:**

- Phase I is a 9 session, 3 hours per session process.
- Phase II is a maintenance program. The group met quarterly in a three-hour session for one year following Phase I. This phase was essential for minimized regression and for driving sustainable change. Confidential coaching outside of the group process was available to each participant as needed periodically for the duration of the fifteen-month process.

### **Leadership Transformation. Topics, learning objectives and Deliverables:**

1. Setting an Environment in which Leadership Thrives
  - Identify a model of leadership development that yields a system for positive behavior change.
2. Leadership and Positive Accountability
  - Articulate the relationship between values and beliefs and positive behavior change.
  - Identify the core components of an organizational culture of positive accountability.
3. Understanding your Behavior
  - Recognize how past experiences can influence present leadership behaviors.
  - Identify performance driven behaviors.
  - Describe how performance driven behaviors can affect leadership effectiveness.
4. Setting Personal Boundaries
  - Identify unhealthy and healthy boundary setting behaviors.
5. The Power of Vision and Values
  - Explain the role of vision and values in personal and organizational development.
  - Compose a personal vision statement that informs decision making and a life of purpose.
6. Principles of Decision Making
  - Identify a model for decision-making that incorporates personal and organizational vision and values.
7. Leadership and Conflict
  - Recognize five conflict behaviors.
8. The Dynamics of Sustaining Positive Change
  - Identify a model for creating and sustaining positive change
9. Staying on purpose – Living a Balance Life
  - Design a personal leadership development plan to include time sensitive goals.

**Instructional Models.** Leadership Transformation models serve as practical tools to help leaders learn how to respond to situations. The teachings of the models are intended to be an intense ramp-up. The expectation is that a leader is able to immediately understand and apply the model for everyday use.

**Personal Transformation Plan.** The Personal Transformation Plan culminates with a clearly defined personal vision statement, core values and time sensitive critical goals with corresponding action plans. The Personal Transformation Plan provides the answers to the big questions. Why do I exist? Where am I going? Who will I be as I journey? How will I get there?

## Project 3 - Henry County Public School District Professional Dynamic Programs (PDP) ProScan - Team Scan Consultation

### *Relevance to RFP*

InitiativeOne's work with Henry County Public School District demonstrates the following relevant experience:

- Effective utilization of an assessment instrument and training that can help leadership effectiveness with employees and volunteers and improve their capacity to minimize destructive conflict and engage in constructive conflict. The assessment and training delivered the following components:
  - Understand yourself and others.
  - Understand the dynamics of your team culture.
  - Improve our Emotional Intelligence - Make better decisions and Solve problems
  - Create and Implement a pathway toward better teamwork.
- The PDP Team Scan and Consultation increased the curriculum department leadership capacity. Specifically, consultation delivered a framework for increased performance in the following areas:
  - Overall Team cohesiveness
  - Effective Team meetings
  - Leading Change - Execute district Initiatives to improve student learning

### **PDP ProScan Assessment and Consultation**

- a. Scheduled and completion date: October 11, 2018
- b. Scheduled and completion date: October 11, 2018
- c. Assessment and consultation
- d. Contact: Lisa Millner, Assistant Superintendent of Curriculum and Learning, Phone: (276) 634-4700, Email: lmillner@henry.k12.va.us
- e. All project work was performed by InitiativeOne as Prime Contractor.

### *Narrative Description of Project*

The PDP ProScan® Survey is a highly accurate and reliable personal assessment that analyzes self-perception, how team members react to their environment, and predictable behaviors they may exhibit. The PDP Team Scan Consultation combined individual PDP ProScan® Survey Reports from the Henry County Curriculum Team into a team report. An InitiativeOne Certified Facilitator provided an overview of how to interpret individual reports and team dynamics revealed in the Team Scan. The team learned how to improve self-awareness and social awareness, a deeper understanding of team dynamics, and a practical plan for engaging in constructive conflict and strategic decision making.

The InitiativeOne PDP team consultation was a highly productive 3-hour session that unleashed the strengths of individuals, uncovered communication styles, and raised awareness regarding how the Curriculum team could work together in a lowered stress and higher energy environment.

Henry County Public School District - Henry County, Virginia

**i. Summary Of Bidder’s Proposed Personnel/Management Approach**

**Paul Metler, Ph.D.** Vice President of Content, InitiativeOne will serve as the Team Leader for the project. Dr. Metler will be responsible for the following:

- Review and approve of all project deliverables including scheduling, interface with DHHS, InitiativeOne team members, EMS Leaders and supervisors.
- Participate in and/or approve all aspects of project delivery, including but not limited to assignment of trainers for delivering the project
- Serve as InitiativeOne primary contact for resolution of delivery related matters.
- All InitiativeOne trainers report directly to the Team Leader, Dr. Paul Metler.

Upon receiving the award, Dr. Paul Metler will convene a project meeting with the approved Transformation Specialists listed below. Dr. Metler will define the scope of work, schedule communication and delivery, assign responsibilities, and clarify the means and methods of reporting, ongoing evaluation, and accountability.

**Dr. Andy Chisel**, InitiativeOne Transformation Specialist will be responsible for the following:

- Provide oversight and subject matter expertise and support for the delivery, interpretation, and application of Professional Dynametric Programs (PDP) Pro Scan Assessment
- Deliver Professional Dynametric Programs (PDP) Pro Scan Assessment as assigned.
- Deliver EMS leadership and supervisory trainings as assigned.

**Robert Smith**, InitiativeOne Transformation Specialist will be responsible for the following:

- Deliver Professional Dynametric Programs (PDP) Pro Scan Assessment as assigned.
- Deliver EMS leadership and supervisory trainings as assigned.

**Mark Traylor**, InitiativeOne Transformation Specialist, will be responsible for the following:

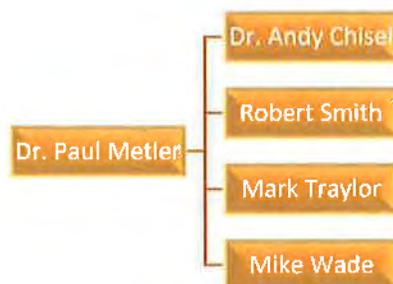
- Deliver Professional Dynametric Programs (PDP) Pro Scan Assessment as assigned.
- Deliver EMS leadership and supervisory trainings as assigned.

**Mike Wade**, InitiativeOne Transformation Specialist will be responsible for the following:

- Deliver Professional Dynametric Programs (PDP) Pro Scan Assessment as assigned.
- Deliver EMS leadership and supervisory trainings as assigned.

**Reporting Structure**

As Team Leader, all members of the InitiativeOne team will report to Dr. Paul Metler.



**PAUL METLER, PH.D.**

10436 Almanac Lane, Knoxville, TN 37932  
Cell: (865) 755-0809 | pmetler@initiative-one.com

---

**INITIATIVEONE, VICE PRESIDENT OF CONTENT DEVELOPMENT**

---

Highly experienced leadership and organizational transformation specialist with more than twenty-five years of experience in facilitation, speaking, teaching, training, mentoring, and coaching leaders / Leadership content development includes academic, organizational, and commercially published works

---

**CORE COMPETENCIES**

---

- Leadership Development
- Professional Speaking
- Author
- Training
- Academic Instruction (Undergraduate and Graduate level)
- Organizational Development
- Executive Coaching
- Facilitation
- Strategic Planning

---

**PROFESSIONAL EXPERIENCE**

---

**InitiativeOne**

Vice President, Content Development (September 2014 – Present)

- Research, develop, and produce leadership content and products to serve client needs
- Deliver InitiativeOne services
- Recruit, onboard, coach, and evaluate new talent
- Perform business development functions to source new clients and candidates

**Lee University, Cleveland, TN (January 2008 – Present)**

Part-Time Faculty

- Develop and instruct leadership courses: Change Issues in Leadership, Leadership and Groups, Leadership Development, Strategic Leadership, Church Leadership and Management

**Heritage Fellowship, Oak Ridge, TN (October 2004 – 2014)**

Lead Pastor

- Provided executive leadership in all aspects of church and preschool operations with an annual budget of \$1M
- Oversaw all strategic planning, budgets and staff development

- Prepared and presented weekly sermons and teachings

**Ametco, Inc./A. J. Metler Hauling and Rigging, Inc.**

- Third generation family business owner
- Experienced owner/executive leader in specialized transportation industry

**EDUCATION AND CREDENTIALS**

---

**University of Tennessee**

Bachelor of Science in Animal Science

**Church of God School of Theology**

Master of Divinity

**Regent University**

Ph.D. in Organizational Leadership

**ADDITIONAL SKILLS AND SERVICE**

---

- Co-authored *Is Everyone on the Boat* and *The Reality of Change*
- Professional Dynametric Program (PDP) Administrator
- Situational Leadership II Trainer
- HealthyLeaders.com Contributor
- Christian Academy of Knoxville, Board of Trustees – Governance Chair, (2012-2018)
- Tennessee Legacy Centre Group Facilitator
- Lee University School of Religion – Graduate Program Committee Member
- Fox43 News guest panelist

**PROFESSIONAL REFERENCES**

---

Dr. Brad Greene  
Phone: (865) 696-6229  
902 N. Central Ave.  
Knoxville, TN 37917

Dr. Jared Cotton  
(757) 547-0153  
312 Cedar Road  
Chesapeake, VA 23322

Dr. Lisa Long  
(423) 303-5111  
1120 N. Ocoee Street  
Cleveland, TN 37311

**ANDY CHISEL**

110 S. Adams Street, Green Bay, WI 54301  
Cell: (920) 830-5611 | achisel@initiative-one.com

---

**INITIATIVEONE, TRANSFORMATION LEADER**

---

Experienced Director Organizational Development with a demonstrated history of working in the logistics, transportation, and supply chain industry. Skilled in Talent Management, Succession Planning, Leadership Development, Strategic Planning, Organizational Development, and Operational Continuous Improvement Process.

Dr. Chisel holds advanced degrees in counseling and in human behavioral science and has been certified by the Leadership Institute of America as a Human Behavioral Consultant and as a civil and family mediator. He is an active member of the American Society for Training & Development (ASTD), the International Society for Performance Improvement (ISPI), and the American Bar Association (ABA).

Prior to founding Chisel Leadership Group, Dr. Chisel served in the United States Marine Corps. At the conclusion of his military service, Dr. Chisel began work among nonprofit's and has since managed two separate organizations. He has also spent many years working in the public sector as the Director of Organizational Development.

---

**CORE COMPETENCIES**

---

- Leadership Development
- Human Behavior
- Author
- Performance Improvement
- Training
- Organizational Development
- Executive Coaching
- Facilitation
- Mediation

---

**PROFESSIONAL EXPERIENCE**

---

**InitiativeOne**

Human Behavioral Development Consultant and Transformation Leader (2016 – Present)

- Deliver InitiativeOne Transformation services
- Perform business development functions to source new clients and candidates
- Oversee Human Performance evaluation and improvement services

**Warehouse Specialists, Inc.**

Director of Organizational Development, (2001 – Present)

**The Chisel Leadership Group, Inc.** (1995 - Present)  
President

## **EDUCATION AND CREDENTIALS**

---

**Liberty University**  
Theology/Theological Studies

**Southwestern Seminary**  
Christian Psychology/Counseling

**University of Biblical Studies and Seminary/American Christian College and Seminary**  
Human and Organizational Behavior

## **ADDITIONAL SKILLS AND SERVICE**

---

- Certified Human Behavioral Consultant, Leadership Institute of America
- Certified Civil and Family Mediator
- American Society for Training and Development Member
- International Society for Performance Improvement Member
- American Bar Association, Member
- USMC

## **PROFESSIONAL REFERENCES**

---

Tom Slaird, Managing Partner Fulcrum Holding LLC  
3800 Washburn Ave South  
Minneapolis, MN 55410  
612-929-0133

Edward Van Zeeland, Vice President - Human Resources WSI,  
Supply Chain Solutions  
1160 N Mayflower Drive, Appleton, WI 54913  
920-831-3737

David Wright, Present and CEO Breadsmith  
of the Twin Cities 1816 S Plymouth Road  
Minnetonka, MN 55305  
612-805-3469/763-402-0541

**Robert Smith**

W6580 Red Oak Glen, Onalaska, WI 54601  
Cell: (608) 317-4242 rsmith@initiative-one.com

---

**INITIATIVEONE, TRANSFORMATION LEADER**

---

Highly experienced leadership and organizational transformation specialist with more than twenty-five years of experience in facilitation, speaking, teaching, training, mentoring, and coaching leaders / Leadership content development includes academic, organizational, and commercially published works

---

**CORE COMPETENCIES**

---

- Leadership Development Coach
- Marketing Analyst
- Branding Specialist
- Process Development
- Ad Campaign Development
- Executive Coaching
- Corporate Strategic Planning
- Corporate Spokesman
- Voice Over for advertising

---

**PROFESSIONAL EXPERIENCE**

---

**InitiativeOne**

Transformation Leader – Western Wisconsin (November 2018 – Present)

- Deliver InitiativeOne Transformation services
- Perform business development functions to source new clients and candidates

**The Idea Center LLC, La Crosse, Wisconsin (January 1991 – October 2018)**

Owner of Branding and Business Strategy Consulting Company

- Develop Marketing and Branding Strategies- Specialist in
  - Supermarkets and Convenience stores
  - Automotive Retail

**American Entertainment, La Crosse Wisconsin (January 1985– June 2001) Owner of**

Disc Jockey Entertainment Company

- Delivered Disc Jockey Entertainment services for 26 radio stations throughout the Midwest

**Gateway Foods Inc. La Crosse Wisconsin (January 1984 July 1992) Director of**

Corporate Retail Strategy

- Develop retail marketing strategies for corporate stores and retail customers

## **EDUCATION AND CREDENTIALS**

---

**University of Wisconsin La Crosse**  
Mass Communications

**Covey Leadership Training**

## **ADDITIONAL SKILLS AND SERVICE**

---

- Writer and producer of radio and television commercials
- Training and corporate video writer and producer
- Entertainer at wedding and other public events
- Strategic Planning
- Sales Training
- Board of Directors, Aptiv Services for People with Disabilities (2016-2018)
- Active Member Valley View Rotary, La Crosse Wisconsin
- Big Brother and Sisters of Western Wisconsin

## **PROFESSIONAL REFERENCES**

---

Don Brenengen, President – Brenengen Auto Group  
P.O. Box 155, HWY 16 West  
Salem, WI 54669 (608) 386-0505

Paul Bagniefski, President- Mid City Steel 115  
Buchner Place  
La Crosse, WI 54603 (608) 793-  
2337

Nick Arlt, Ecommerce Director Festival Foods 1724  
Lawrence Dr.  
De Pere, WI 54115 (920) 964-  
3409



## MARK TRAYLOR

3330 E. Thoroughbred Ln, Boise, ID 83716  
(208) 608-0601 | mtraylor@Initiative-One.com

### TRANSFORMATION LEADER

---

Through my work at InitiativeOne I propel companies toward improved results by transforming their leaders and their respective teams to function much more effectively. Transformative leadership is built on trust, respectful relationships, authentic behavior, and pro-active thinking. These are the qualities that define transformational leaders. Our processes teach leaders how to make this essential transition within a dynamic environment that nourishes deep self-discovery and promotes high trust formation between participants. We help leaders to rise above the noise, to lead by principle instead of the path of least resistance, to gain mastery in decision-making and problem solving, and to leverage the powerful resources of others for highest success.

### CORE COMPETENCIES

---

- Leadership development
- Organizational leadership
- Program development
- Inspirational leadership
- Mission-oriented
- Public speaking
- Exceptional communication skills
- Over 40 years of experience speaking to large and small groups in various settings
- Energetic, humorous, progressive and positive style of speaking
- Help people to see old issues in new ways, connect them with real solutions, and enable them to discover new points of view
- Strategic planning
- Crisis management

### PROFESSIONAL EXPERIENCE

---

**Transformation Leader** **06/2018 to Current**  
**Initiative One - Green Bay, WI**

As a Transformation Leader for Initiative-One I am responsible for business development, and leadership and organizational transformation for our clients. I facilitate the Initiative-One process, a transformative experience for leaders who want to improve their personal leadership skills, enhance communication throughout their organization, and reduce drama and turnover within their ranks.

**Lead Pastor** **04/1994 to 10/2018**  
**Eastwind Community Church - Boise, ID**

As founder and Lead Pastor of Eastwind Community Church, I established and led a large and progressive congregation in Boise, Idaho for 24 years. I began the congregation from scratch, with no members and little money. It grew to become a thriving and healthy community of over 1200 people and continues to have a profound impact in the Southeast Boise area.

**Business Consultant** **2016-2017**  
**The Table Group**

I have experience as a business consultant with the "Table Group" founded by Patrick Lencioni.

**PROFESSIONAL REFERENCES**

---

Mike McHargue, Principal Consultant for the Table Group  
5908 S. Horseshoe Pl  
Boise ID 83716  
(208) 866-8622  
[mike.mchargue@tablegroupconsulting.com](mailto:mike.mchargue@tablegroupconsulting.com)

Jim Bean, CEO of Preco  
10335 W Emerald St Boise ID 83704  
(208) 794-8891  
[jbean@preco.com](mailto:jbean@preco.com)

Dennis Doan  
Fire Chief, City of Boise  
333 N. Mark Stall PL.  
Boise, ID 83704  
(208) 570-6560  
[ddoan@cityofboise.org](mailto:ddoan@cityofboise.org)

**MIKE WADE**

9900 Echo Summit Drive, Oak Point, TX 75068  
(214) 726-2901 | mwade@Initiative-One.com

**TRANSFORMATION LEADER**

Highly experienced Transformation Leader with who has a proven record of increasing organizational results by majoring in leadership development for the current team and building bench strength for the future | Passionate about helping individuals and companies become more than they imagined | Over three decades of leadership experience | Eighteen years as a football coach, ranging from high school to the professional ranks | Entered the business world where he served as Vice President of Sales for nine years at a privately owned company, and during that time, sales grew from \$83 million per year to just under \$1 billion per year | Transformation Leader who is committed to helping others achieve their ultimate success and potential.

**PROFESSIONAL EXPERIENCE**

---

**InitiativeOne** **2015-Present****Leadership Transformation Facilitator and Key-Note Speaker**

- Facilitate C-Suite Executives' personal, professional, and organizational growth
- Help organizations develop bench strength from a leadership perspective
- Act as Keynote Speaker on leadership topics and team-building

**AdvoCare International** **2006-2015****Vice President Sales – AdvoCare International*****Responsible for the creation and presentation of:***

- Growth Strategies
- Trainings for all aspects of company
- Culture development
- Personal development
- Leadership development
- Business Opportunity events
- Key-Note speaking

***Results:***

- Sales increased from \$83 million in 2006 to just under \$1 Billion in 2015
- Sales representatives increased from 60,000 in 2006 to 620,000 in 2015
- “Spirit of AdvoCare” Award – First man to win this coveted award, which exemplifies a spirit of helping people become more than they normally would become
- First Director of Sports Relations

<b>Shreveport Pirates Canadian Professional Football League Offensive Coordinator</b>	<b>1995</b>
<b>Southern Methodist University Offensive Coordinator – Football</b>	<b>1989 - 1994</b>
<b>University of Missouri Assistant Football Coach</b>	<b>1981 - 1988</b>
<b>University of Tulsa Assistant Football Coach – Graduate Assistant</b>	<b>1980</b>

All Collegiate Football positions include the following roles:  
Recruiting, Training, Culture Development, Speaking, Strategizing

<b>Bixby High School, Bixby, Oklahoma Offensive Coordinator for Football Track Coach</b>	<b>1978-1979</b>
--	------------------

Was also a janitor, a garbage truck driver, and on a building demolition crew after hours to earn extra income for a growing family (while coaching)

## **EDUCATION**

---

**B.S. of Education – Southeastern Oklahoma State University**

## **FAMILY**

---

- Married to Dr. Deb Wade, VP of Psychological Services and Sports Psychologist, Grand Canyon University, Phoenix, Arizona
- Two adult sons, Kenny Wade and Tim Wade
- Two grandchildren, Garrett Wade, Ellie Wade
- Experienced Conference Presenter with Dr. Deb Wade across America, Mexico, and the Dominican Republic
- Owned a faith-based Counseling Center in the Dallas area for over 20 years.
- Members of First Baptist Church – Carrollton, TX
  - Served as Chairman of the Deacon Council and served on various committees.
  - Taught class for married couples for many years

## **PROFESSIONAL REFERENCES**

---

Mike Vaught, Vice President of Athletics  
Grand Canyon University  
3300 W. Camelback Road  
Phoenix, AZ 85017  
Mvaught86@gmail.com

The Honorable Kyle Sylvester  
Circuit Court Clerk  
Fayetteville, Arkansas 72701  
479-200-0001  
ksylvester@co.washington.ar.us

Jaci Leitgeb  
Vice President Leitgeb  
Enterprises  
Weddington, NC 28104  
704-965-0493  
How2stayfit@gmail.com

j. Subcontractors

InitiativeOne does not intend to use any subcontractors on this project.

## Sections II through IV

---

*A completed Sections II through IV follows this page.*

---

**III. CONTRACTOR DUTIES**
**A. INDEPENDENT CONTRACTOR / OBLIGATIONS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PRM			

It is agreed that the Contractor is an independent contractor and that nothing contained herein is intended or should be construed as creating or establishing a relationship of employment, agency, or a partnership.

The Contractor is solely responsible for fulfilling the contract. The Contractor or the Contractor's representative shall be the sole point of contact regarding all contractual matters.

The Contractor shall secure, at its own expense, all personnel required to perform the services under the contract. The personnel the Contractor uses to fulfill the contract shall have no contractual or other legal relationship with the State; they shall not be considered employees of the State and shall not be entitled to any compensation, rights or benefits from the State, including but not limited to, tenure rights, medical and hospital care, sick and vacation leave, severance pay, or retirement benefits.

By-name personnel commitments made in the Contractor's proposal shall not be changed without the prior written approval of the State. Replacement of these personnel, if approved by the State, shall be with personnel of equal or greater ability and qualifications.

All personnel assigned by the Contractor to the contract shall be employees of the Contractor or a subcontractor, and shall be fully qualified to perform the work required herein. Personnel employed by the Contractor or a subcontractor to fulfill the terms of the contract shall remain under the sole direction and control of the Contractor or the subcontractor respectively.

With respect to its employees, the Contractor agrees to be solely responsible for the following:

1. Any and all pay, benefits, and employment taxes and/or other payroll withholding;
2. Any and all vehicles used by the Contractor's employees, including all insurance required by state law;
3. Damages incurred by Contractor's employees within the scope of their duties under the contract;
4. Maintaining Workers' Compensation and health insurance that complies with state and federal law and submitting any reports on such insurance to the extent required by governing law;
5. Determining the hours to be worked and the duties to be performed by the Contractor's employees; and,
6. All claims on behalf of any person arising out of employment or alleged employment (including without limit claims of discrimination alleged against the Contractor, its officers, agents, or subcontractors or subcontractor's employees).

If the Contractor intends to utilize any subcontractor, the subcontractor's level of effort, tasks, and time allocation should be clearly defined in the bidder's proposal. The Contractor shall agree that it will not utilize any subcontractors not specifically included in its proposal in the performance of the contract without the prior written authorization of the State.

The State reserves the right to require the Contractor to reassign or remove from the project any Contractor or subcontractor employee.

Contractor shall insure that the terms and conditions contained in any contract with a subcontractor does not conflict with the terms and conditions of this contract.

The Contractor shall include a similar provision, for the protection of the State, in the contract with any subcontractor engaged to perform work on this contract.

**B. EMPLOYEE WORK ELIGIBILITY STATUS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PJM			

The Contractor is required and hereby agrees to use a federal Immigration verification system to determine the work eligibility status of employees physically performing services within the State of Nebraska. A federal immigration verification system means the electronic verification of the work authorization program authorized by the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of an employee.

If the Contractor is an individual or sole proprietorship, the following applies:

- The Contractor must complete the United States Citizenship Attestation Form, available on the Department of Administrative Services website at <http://das.nebraska.gov/inter/inter/asp.asp>.  
The completed United States Attestation Form should be submitted with the RFP response.
- If the Contractor indicates on such attestation form that he or she is a qualified alien, the Contractor agrees to provide the US Citizenship and Immigration Services documentation required to verify the Contractor's lawful presence in the United States using the Systematic Alien Verification for Entitlements (SAVE) Program.
- The Contractor understands and agrees that lawful presence in the United States is required and the Contractor may be disqualified or the contract terminated if such lawful presence cannot be verified as required by Neb. Rev. Stat. §4-108.

**C. COMPLIANCE WITH CIVIL RIGHTS LAWS AND EQUAL OPPORTUNITY EMPLOYMENT / NONDISCRIMINATION (Statutory)**

The Contractor shall comply with all applicable local, state, and federal statutes and regulations regarding civil rights laws and equal opportunity employment. The Nebraska Fair Employment Practice Act prohibits Contractors of the State of Nebraska, and their subcontractors, from discriminating against any employee or applicant for employment, with respect to hire, tenure, terms, conditions, compensation, or privileges of employment because of race, color, religion, sex, disability, marital status, or national origin (Neb. Rev. Stat. §48-1101 to 48-1125). The Contractor guarantees compliance with the Nebraska Fair Employment Practice Act, and breach of this provision shall be regarded as a material breach of contract. The Contractor shall insert a similar provision in all subcontracts for services to be covered by any contract resulting from this RFP.

**D. COOPERATION WITH OTHER CONTRACTORS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PJM			

Contractor may be required to work with or in close proximity to other contractors or individuals that may be working on same or different projects. The Contractor shall agree to cooperate with such other contractors or individuals, and shall not commit or permit any act which may interfere with the performance of work by any other contractor or individual. Contractor is not required to compromise Contractor's intellectual property or proprietary information unless expressly required to do so by this contract.

**E. PERMITS, REGULATIONS, LAWS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PAW			

The contract price shall include the cost of all royalties, licenses, permits, and approvals, whether arising from patents, trademarks, copyrights or otherwise, that are in any way involved in the contract. The Contractor shall obtain and pay for all royalties, licenses, and permits, and approvals necessary for the execution of the contract. The Contractor must guarantee that it has the full legal right to the materials, supplies, equipment, software, and other items used to execute this contract.

**F. OWNERSHIP OF INFORMATION AND DATA / DELIVERABLES**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PAW			

The State shall have the unlimited right to publish, duplicate, use, and disclose all information and data developed or obtained by the Contractor on behalf of the State pursuant to this contract

The State shall own and hold exclusive title to any deliverable developed as a result of this contract. Contractor shall have no ownership interest or title, and shall not patent, license, or copyright, duplicate, transfer, sell, or exchange, the design, specifications, concept, or deliverable.

**G. INSURANCE REQUIREMENTS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
PAW			

The Contractor shall throughout the term of the contract maintain insurance as specified herein and provide the State a current Certificate of Insurance/Acord Form (COI) verifying the coverage. The Contractor shall not commence work on the contract until the insurance is in place. If Contractor subcontracts any portion of the contract the Contractor must, throughout the term of the contract, either:

1. Provide equivalent insurance for each subcontractor and provide a COI verifying the coverage for the subcontractor;
2. Require each subcontractor to have equivalent insurance and provide written notice to the State that the Contractor has verified that each subcontractor has the required coverage; or,
3. Provide the State with copies of each subcontractor's Certificate of Insurance evidencing the required coverage.

The Contractor shall not allow any subcontractor to commence work until the subcontractor has equivalent insurance. The failure of the State to require a COI, or the failure of the Contractor to provide a COI or require subcontractor insurance shall not limit, relieve, or decrease the liability of the Contractor hereunder.

*In the event that any policy written on a claims-made basis terminates or is canceled during the term of the contract or within one (1) year of termination or expiration of the contract, the Contractor shall obtain an extended discovery or reporting period, or a new insurance policy, providing coverage required by this contract for the term of the contract and one (1) year following termination or expiration of the contract.*

If by the terms of any insurance a mandatory deductible is required, or if the Contractor elects to increase the mandatory deductible amount, the Contractor shall be responsible for payment of the amount of the deductible in the event of a paid claim.

Notwithstanding any other clause in this contract, the State may recover up to the liability limits of the insurance policies required herein.

**1. WORKERS' COMPENSATION INSURANCE**

The Contractor shall take out and maintain during the life of this contract the statutory Workers' Compensation and Employer's Liability Insurance for all of the contractor's employees to be engaged in work on the project under this contract and, in case any such work is sublet, the Contractor shall require the subcontractor similarly to provide Worker's Compensation and Employer's Liability Insurance for all of the subcontractor's employees to be engaged in such work. This policy shall be written to meet the statutory requirements for the state in which the work is to be performed, including Occupational Disease. The policy shall include a waiver of subrogation in favor of the State. The COI shall contain the mandatory COI subrogation waiver language found hereinafter. The amounts of such insurance shall not be less than the limits stated hereinafter. For employees working in the State of Nebraska, the policy must be written by an entity authorized by the State of Nebraska Department of Insurance to write Workers' Compensation and Employer's Liability Insurance for Nebraska employees.

**2. COMMERCIAL GENERAL LIABILITY INSURANCE AND COMMERCIAL AUTOMOBILE LIABILITY INSURANCE**

The Contractor shall take out and maintain during the life of this contract such Commercial General Liability Insurance and Commercial Automobile Liability Insurance as shall protect Contractor and any subcontractor performing work covered by this contract from claims for damages for bodily injury, including death, as well as from claims for property damage, which may arise from operations under this contract, whether such operation be by the Contractor or by any subcontractor or by anyone directly or indirectly employed by either of them, and the amounts of such insurance shall not be less than limits stated hereinafter.

The Commercial General Liability Insurance shall be written on an occurrence basis, and provide Premises/Operations, Products/Completed Operations, Independent Contractors, Personal Injury, and Contractual Liability coverage. The policy shall include the State, and others as required by the contract documents, as Additional Insured(s). This policy shall be primary, and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory. The COI shall contain the mandatory COI liability waiver language found hereinafter. The Commercial Automobile Liability Insurance shall be written to cover all Owned, Non-owned, and Hired vehicles.

<b>REQUIRED INSURANCE COVERAGE</b>	
<b>COMMERCIAL GENERAL LIABILITY</b>	
General Aggregate	\$2,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal/Advertising Injury	\$1,000,000 per occurrence
Bodily Injury/Property Damage	\$1,000,000 per occurrence
Medical Payments	\$10,000 any one person
Damage to Rented Premises (Fire)	\$300,000 each occurrence
Contractual	Included
XCU Liability (Explosion, Collapse, and Underground Damage)	Included
Independent Contractors	Included
Abuse & Molestation	Included
<i>If higher limits are required, the Umbrella/Excess Liability limits are allowed to satisfy the higher limit.</i>	
<b>WORKER'S COMPENSATION</b>	
Employers Liability Limits	\$500K/\$500K/\$500K
Statutory Limits- All States	Statutory - State of Nebraska
Voluntary Compensation	Statutory
<b>COMMERCIAL AUTOMOBILE LIABILITY</b>	
Bodily Injury/Property Damage	\$1,000,000 combined single limit
Include All Owned, Hired & Non-Owned Automobile liability	Included
Motor Carrier Act Endorsement	Where Applicable
<b>UMBRELLA/EXCESS LIABILITY</b>	
Over Primary Insurance	\$5,000,000 per occurrence
<b>MANDATORY COI SUBROGATION WAIVER LANGUAGE</b>	
"Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska."	
<b>MANDATORY COI LIABILITY WAIVER LANGUAGE</b>	
"Commercial General Liability & Commercial Automobile Liability policies shall name the State of Nebraska as an Additional Insured and the policies shall be primary and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory as additionally insured."	

If the mandatory COI subrogation waiver language or mandatory COI liability waiver language on the COI states that the waiver is subject to, condition upon, or otherwise limit by the insurance policy, a copy of the relevant sections of the policy must be submitted with the COI so the State can review the limitations imposed by the insurance policy.

3. **EVIDENCE OF COVERAGE**  
 The Contractor shall furnish the Contract Manager, with a certificate of insurance coverage complying with the above requirements prior to beginning work at:

Department of Health and Human Services  
 Division of Public Health  
 Attn: Emergency Health Service Program Manager  
 301 Centennial Mall S. 3<sup>rd</sup> floor  
 Lincoln, NE 68509

These certificates or the cover sheet shall reference the RFP number, and the certificates shall include the name of the company, policy numbers, effective dates, dates of expiration, and amounts and types of coverage afforded. If the State is damaged by the failure of the Contractor to maintain such insurance, then the Contractor shall be responsible for all reasonable costs properly attributable thereto.

Reasonable notice of cancellation of any required insurance policy must be submitted to the contract manager as listed above when issued and a new coverage binder shall be submitted immediately to ensure no break in coverage.

**4. DEVIATIONS**

The insurance requirements are subject to limited negotiation. Negotiation typically includes, but is not necessarily limited to, the correct type of coverage, necessity for Workers' Compensation, and the type of automobile coverage carried by the Contractor.

**H. ANTITRUST**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AM			

The Contractor hereby assigns to the State any and all claims for overcharges as to goods and/or services provided in connection with this contract resulting from antitrust violations which arise under antitrust laws of the United States and the antitrust laws of the State

**I. CONFLICT OF INTEREST**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AM			

By submitting a proposal, bidder certifies that there does not now exist a relationship between the bidder and any person or entity which is or gives the appearance of a conflict of interest related to this RFP or project.

The bidder certifies that it shall not take any action or acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its services hereunder or which creates an actual or an appearance of conflict of interest.

The bidder certifies that it will not knowingly employ any individual known by bidder to have a conflict of interest.

The Parties shall not knowingly, for a period of two years after execution of the contract, recruit or employ any employee or agent of the other Party who has worked on the RFP or project, or who had any influence on decisions affecting the RFP or project

**J. STATE PROPERTY**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AM			

The Contractor shall be responsible for the proper care and custody of any State-owned property which is furnished for the Contractor's use during the performance of the contract. The Contractor shall reimburse the State for any loss or damage of such property; normal wear and tear is expected.

**K. SITE RULES AND REGULATIONS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

The Contractor shall use its best efforts to ensure that its employees, agents, and subcontractors comply with site rules and regulations while on State premises. If the Contractor must perform on-site work outside of the daily operational hours set forth by the State, it must make arrangements with the State to ensure access to the facility and the equipment has been arranged. No additional payment will be made by the State on the basis of lack of access, unless the State fails to provide access as agreed to in writing between the State and the Contractor.

**L. ADVERTISING**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

The Contractor agrees not to refer to the contract award in advertising in such a manner as to state or imply that the company or its services are endorsed or preferred by the State. Any publicity releases pertaining to the project shall not be issued without prior written approval from the State.

**M. NEBRASKA TECHNOLOGY ACCESS STANDARDS (Statutory)**

Contractor shall review the Nebraska Technology Access Standards, found at <http://nile.nebraska.gov/standards/201.html> and ensure that products and/or services provided under the contract are in compliance or will comply with the applicable standards to the greatest degree possible. In the event such standards change during the Contractor's performance, the State may create an amendment to the contract to request the contract comply with the changed standard at a cost mutually acceptable to the parties.

**N. DISASTER RECOVERY/BACK UP PLAN**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

The Contractor shall have a disaster recovery and back-up plan, of which a copy should be provided upon request to the State, which includes, but is not limited to equipment, personnel, facilities, and transportation, in order to continue services as specified under the specifications in the contract in the event of a disaster.

**O. DRUG POLICY**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AKL			

Contractor certifies it maintains a drug free work place environment to ensure worker safety and workplace integrity.  
 Contractor agrees to provide a copy of its drug free workplace policy at any time upon request by the State.

**IV. PAYMENT**
**A. PROHIBITION AGAINST ADVANCE PAYMENT (Statutory)**

Payments shall not be made until contractual deliverable(s) are received and accepted by the State.

**B. TAXES (Statutory)**

The State is not required to pay taxes and assumes no such liability as a result of this solicitation. Any property tax payable on the Contractor's equipment which may be installed in a state-owned facility is the responsibility of the Contractor.

**C. INVOICES**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AM			

Invoices for payments must be submitted by the Contractor to the agency requesting the services with sufficient detail to support payment. Invoices shall include the date(s) of course(s), name of course(s), roster of participants and participant evaluations. Invoices shall be sent to:

Department of Health and Human Services  
 Division of Public Health  
 Attn: Emergency Health Systems  
 301 Centennial Mall S. 3<sup>rd</sup> floor  
 Lincoln, NE 68509

The terms and conditions included in the Contractor's invoice shall be deemed to be solely for the convenience of the parties. No terms or conditions of any such invoice shall be binding upon the State, and no action by the State, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping the State with respect to any such term or condition, unless the invoice term or condition has been previously agreed to by the State as an amendment to the contract.

**D. INSPECTION AND APPROVAL**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AM			

Final inspection and approval of all work required under the contract shall be performed by the designated State officials.

The State and/or its authorized representatives shall have the right to enter any premises where the Contractor or subcontractor duties under the contract are being performed, and to inspect, monitor or otherwise evaluate the work being performed. All inspections and evaluations shall be at reasonable times and in a manner that will not unreasonably delay work.

**E. PAYMENT**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

State will render payment to Contractor when the terms and conditions of the contract and specifications have been satisfactorily completed on the part of the Contractor as solely determined by the State. (Neb. Rev. Stat. §73-506(1)) Payment will be made by the responsible agency in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §81-2401 through 81-2408). The State may require the Contractor to accept payment by electronic means such as ACH deposit. In no event shall the State be responsible or liable to pay for any services provided by the Contractor prior to the Effective Date of the contract, and the Contractor hereby waives any claim or cause of action for any such services.

**F. LATE PAYMENT (Statutory)**

The Contractor may charge the responsible agency interest for late payment in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §81-2401 through 81-2408).

**G. SUBJECT TO FUNDING / FUNDING OUT CLAUSE FOR LOSS OF APPROPRIATIONS**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

The State's obligation to pay amounts due on the contract for a fiscal years following the current fiscal year is contingent upon legislative appropriation of funds. Should said funds not be appropriated, the State may terminate the contract with respect to those payments for the fiscal year(s) for which such funds are not appropriated. The State will give the Contractor written notice thirty (30) calendar days prior to the effective date of termination. All obligations of the State to make payments after the termination date will cease. The Contractor shall be entitled to receive just and equitable compensation for any authorized work which has been satisfactorily completed as of the termination date. In no event shall the Contractor be paid for a loss of anticipated profit

**H. RIGHT TO AUDIT (First Paragraph is Statutory)**

Accept (Initial)	Reject (Initial)	Reject & Provide Alternative within RFP Response (Initial)	NOTES/COMMENTS:
AMM			

The State shall have the right to audit the Contractor's performance of this contract upon a 30 days' written notice. Contractor shall utilize generally accepted accounting principles, and shall maintain the accounting records, and other records and information relevant to the contract (Information) to enable the State to audit the contract. The State may audit and the Contractor shall maintain, the Information during the term of the contract and for a period of five (5) years after the completion of this contract or until all issues or litigation are resolved, whichever is later. The Contractor shall make the Information available to the State at Contractor's place of business or a location acceptable to both Parties during normal business hours. If this is not practical or the Contractor so elects, the Contractor may provide electronic or paper copies of the Information. The State reserves the right to examine, make copies of, and take notes on any Information relevant to this contract, regardless of the form or the Information, how it is stored, or who possesses the Information. Under no circumstance will the Contractor be required to create or maintain documents not kept in the ordinary course of Contractor's business operations, nor

will Contractor be required to disclose any information, including but not limited to product cost data, which is confidential or proprietary to Contractor.

The Parties shall pay their own costs of the audit unless the audit finds a previously undisclosed overpayment by the State. If a previously undisclosed overpayment exceeds one-half of one percent (.5%) of the total contract billings, or if fraud, material misrepresentations, or non-performance is discovered on the part of the Contractor, the Contractor shall reimburse the State for the total costs of the audit. Overpayments and audit costs owed to the State shall be paid within ninety days of written notice of the claim. The Contractor agrees to correct any material weaknesses or condition found as a result of the audit.

## Section V

### F. Bidder Requirements

#### EMS Leadership Training

Describe how the EMS leadership and supervisory trainings progress from a beginning to an advanced level of training. Include how the classes or sessions are broken down.

InitiativeOne will provide experienced and new leadership within EMS agencies with the tools and skills to run and operate an EMS with a proven training methodology that transcends the usual seminar format by providing extensive group facilitation in a dynamic interactive environment.

Each day of training will include a “check-in” component. It’s essential for the leaders in the room to share, listen, and engage. The “check-in” will provide an opportunity for leaders to engage and create case studies from actual experiences. Course content will connect with the reality EMS leaders encounter each day. The powerful group interaction will effectively surface and address key issues essential for developing new and experienced EMS leadership and organizational effectiveness. The group interaction will provide an extensive “practice field” for volunteers and employees to model and transfer these new leadership behaviors throughout the rest of the organization.

In Year One, EMS employees and volunteers will receive Level 1 and Level 2 training delivered in eight modules during four consecutive days - 28 hours of training. In Year Two, EMS employees and volunteers will receive Level 3 and Level 4 training delivered in eight modules during four consecutive days - 28 hours of training. Year One will provide basic leadership development (Level 1 and 2) and Year Two will build upon the previous training and provide advanced leadership development (Level 3 and 4)

Training for EMS leaders will begin with a Professional Dynametric Programs (PDP) Pro Scan Assessment. Each participant will complete the assessment and receive an individual report. Day One will begin with an extensive review of the reports. The PDP report will provide a basis for interactive discussions throughout the training.

The PDP report will identify the following:

- I. **BASIC/NATURAL SELF** – the way you would function if there were not outside pressures for adjustment. The way you function most Naturally and Efficiently.
- II. **UNIQUE TRAIT PAIRS** – Your trait combinations yield these unique characteristics. They describe certain action patterns and interaction with other people.
- III. **LOGIC** – Decision-Making Style.
- IV. **ENERGY STYLES** – How an individual accomplishes tasks or approaches goals.
- V. **KINETIC ENERGY LEVEL** - Amount of energy a person has to accomplish a task. A person’s capacity or fuel – their battery size and charge. Relates to: Mental, Emotional and Physical energy.
- VI. **COMMUNICATION STYLE** – How do you communicate with others? How do you prefer to receive communication?
- VII. **LEADERSHIP STYLE** – Identifies your most efficient and natural way to lead.
- VIII. **BACKUP STYLE** – Identifies how you lead when you are out of energy or patience.
- IX. **BACKUP STYLE LEARNED RESPONSES** - Practical guide for Emotional Intelligence development.
- X. **PRIORITY ENVIRONMENT** – **Stress Analysis, Dimensional Adjustment, Satisfaction Analysis, and Energy Drain.**

- XI. **STRESS ANALYSIS** – Adjustments to outside or internal pressures. The amount of energy being expended on each adjustment is reflected in the length of each line with an arrow pointing in the direction you feel the need for adjustment. **Distress** is Negative or bad stress. Think in terms of “Negative Tension” that pulls you away from your purpose or vision. **Eustress** is self-imposed or positive stress. Think in terms of “Creative Tension” that moves you toward your purpose or vision.
- XII. **SATISFACTION ANALYSIS** - Relates to whether or not your Goals and Aspirations are being fulfilled.
- XIII. **ENERGY DRAIN** – How stress and satisfaction affect energy level.
- XIV. **AVAILABLE ENERGY** - Energy felt as a result of energy drain.
- XV. **PREDICTOR/OUTWARD SELF** - How others observe you.

Equipped with the information gleaned from the PDP report the facilitator-led training will surface real time leadership challenges drawn directly from the EMS leadership context. Thereby the course content will transcend a theoretical approach and provide leaders with an opportunity to solve problems within the context of real time case studies. The active learning approach will equip the leaders to sustain learning and development from year to year.

### **EMS Leadership Training - YEAR ONE Modules**

#### **Day One**

Module 1: PDP Assessment: Who am I? Why do I lead the way I lead? How do I lead when I lead at my best?

Module 2: Why self-leadership matters: Learn to lead yourself before you lead others.

#### **Day Two**

Module 1: Leading on Purpose: Clarifying and executing the EMS Mission.

Module 2: Improving Performance: Rise above the noise and focus on critical goals.

#### **Day Three**

Module 1: Building a high performing team: It begins and ends with trust.

Module 2: Creating a positive accountability culture with EMS employees and volunteers.

#### **Day Four**

Module 1: Creating a learning culture without a fear of failure.

Module 2: Sustaining positive momentum beyond the training event.

### **EMS Leadership Training YEAR TWO Modules**

#### **Day One**

Module 1: Embracing positive tension: What is my current reality and what is my preferred future?

Module 2: Aligning personal and organizational resources with the EMS mission.

#### **Day Two**

Module 1: Identifying strategic opportunities for personal and organizational development.

Module 2: Why do most strategic plans fail? Developing and implementing an EMS organizational strategy and staying the course.

Day Three

Module 1: Getting unstuck: Developing a growth mindset.

Module 2: Overcome the drama: Creating a constructive conflict environment

Day Four

Module 1: Inspiring positive change and neutralizing naysayer behaviors

Module 2: Identifying and overcoming obstacles that thwart sustained positive change

### **EMS Supervisory Training**

InitiativeOne will deliver Supervisor training that will provide the skills and tools to supervise EMS personnel. In a world that no longer views position or sheer competence as the foundation for effective leadership, supervisors must learn how to lead through trust, respectful relationships, authentic behavior and pro-active thinking. EMS Supervisory Training will equip the participants to make this essential transition within a dynamic learning environment that nourishes deep self-discovery and promotes high trust formation. The courses will help supervisors to elevate strategic leadership, trust and teamwork in crisis situations.

The training will equip supervisors to lead by principle instead of the path of least resistance, to gain mastery in decision-making and problem solving, and to leverage the powerful resources of others for highest success. The need for high performing teams is apparent: Increased complexity makes organizations and environments too complex for a single person to lead. The best teams have the right purpose: the right people, the right plan and implement the right practices.

Through a powerful dynamic training led by a highly skilled facilitator, participants will engage in best practice methodology within real world challenges which can be directly applied in their own EMS leadership context. EMS Supervisors will receive 8 modules of training across 4 full days as approved on an annual basis.

EMS Supervisor training will begin with a Professional Dynametric Programs (PDP) Pro Scan Assessment. Each participant will complete the assessment and receive an individual report. Level 1 training will begin with an extensive interpretation of the individual reports. The PDP will provide a basis for interactive discussions throughout the training. In addition, the individual reports will be combined into a team report. The individual and team PDP reports will provide a practical framework for helping supervisors:

- **Deepen understanding of self and others.**
- **Understand how the dynamics team culture can be leveraged for increased effectiveness.**
- **Improve Emotional Intelligence - leverage your self-awareness and social awareness toward better decision making and problem solving.**

- **Target a few specific behaviors for continued improvement during the critical discussions in the future. For example, the information will provide for positive impact on the quality of meetings, volunteer and employee recruitment, evaluation and retention.**

The PDP ProScan individual report and team scan will incorporate the following:

- I. **BASIC/NATURAL SELF** – the way you would function if there were not outside pressures for adjustment. The way you function most Naturally and Efficiently.
- II. **UNIQUE TRAIT PAIRS** – Your trait combinations yield these unique characteristics. They describe certain action patterns and interaction with other people.
- III. **LOGIC** – Decision-Making Style.
- IV. **ENERGY STYLES** – How an individual accomplishes tasks or approaches goals.
  
- V. **KINETIC ENERGY LEVEL** - Amount of energy a person has to accomplish a task. A person's capacity or fuel – their battery size and charge. Relates to: Mental, Emotional and Physical energy.
- VI. **COMMUNICATION STYLE** – How do you communicate with others? How do you prefer to receive communication?
- VII. **LEADERSHIP STYLE** – Identifies your most efficient and natural way to lead.
- VIII. **BACKUP STYLE** – Identifies how you lead when you are out of energy or patience.
- IX. **BACKUP STYLE LEARNED RESPONSES** - Practical guide for Emotional Intelligence development.
- X. **PRIORITY ENVIRONMENT** – **Stress Analysis, Dimensional Adjustment, Satisfaction Analysis, and Energy Drain.**
- XI. **STRESS ANALYSIS** – Adjustments to outside or internal pressures. The amount of energy being expended on each adjustment is reflected in the length of each line with an arrow pointing in the direction you feel the need for adjustment. **Distress** is Negative or bad stress. Think in terms of “Negative Tension” that pulls you away from your purpose or vision. **Eustress** is self-imposed or positive stress. Think in terms of “Creative Tension” that moves you toward your purpose or vision.
- XII. **SATISFACTION ANALYSIS** - Relates to whether or not your Goals and Aspirations are being fulfilled.
- XIII. **ENERGY DRAIN** – How stress and satisfaction affect energy level.
- XIV. **AVAILABLE ENERGY** - Energy felt as a result of energy drain.
- XV. **PREDICTOR/OUTWARD SELF** - How others observe you.

Equipped with the information gleaned from the PDP report the facilitator-led training will surface real time supervisory challenges drawn directly from the EMS context. Thereby the course content will move beyond the theoretical and provide leaders with an opportunity to solve problems within the context of real time case studies. The active learning approach will equip the leaders to sustain learning and development from year to year.

### **Day One**

Module 1: Understanding myself and others: The PDP ProScan Assessment.

Module 2: Best practices for developing healthy trust: Establishing team norms that become more than a plaque on the wall.

**Day Two**

Module 1: Time management: Investing the right time with the right people

Module 2: Strategic Leadership: Mobilizing EMS personnel toward critical goals

**Day Three**

Module 1: Creating a positive accountability culture

Module 2: Acquiring and developing a committed team of EMS employees and volunteers

**Day Four**

Module 1: Delivering Feedback and mastering difficult conversations

Module 2: The Reality of Change: A guide for sustaining positive change beyond the training

**Preparation for Volunteers**

Leadership in a volunteer EMS organization provides unique challenges and obstacles. What is your approach in this training to help prepare leaders in volunteer organizations? At a minimum, please address how to lead volunteers, deal with conflict, the concept of “are volunteers employees?”, and how to move an organization forward.

InitiativeOne’s approach begins with our belief that effective leadership in volunteer EMS organizations begins with trust. Leadership does not depend on the title of the leader or the employment status of the individual. Whether employee or volunteer, sustained leadership effectiveness requires healthy trust. Healthy trust is not automatic. Creating and sustaining healthy trust within an EMS organization requires intent and effort.

Healthy trust undergirds and affects every relationship within the organization and in the community. Without trust, leaders forfeit opportunities to lead. InitiativeOne training will help EMS leaders identify behaviors that create trust and the behaviors that derail trust. Healthy trust thrives when conflict is constructive rather than destructive.

The training will introduce the most common conflict behaviors and how effective leaders choose wisely in the midst of disagreement. First, leaders and supervisors will learn how to cultivate emotional awareness and balance assertiveness and cooperativeness will enable to healthier collaboration and conflict resolution.

Second EMS leaders and supervisors will learn to effectively depersonalize conflict. Choosing an effective behavior means choosing to avoid personalizing conflict. Healthy conflict stays within the boundaries of the issue. Unhealthy conflict increases defensiveness and blaming. Participants will learn how to shift focus from the “person” to the “issue” and thereby evaluate the relevant information and maintain a healthy perspective. EMS leaders and supervisors will learn how to evaluate and improve their conflict leadership.

EMS organizations must respond to the unique challenges of leading volunteers with a commitment to leadership and organizational authenticity. Thus, InitiativeOne begins all leadership training with an emphasis on self-leadership. When leaders embrace and practice self-leadership, they will be well-

prepared to lead volunteers and the organization in an open, honest and reliable way. They will focus on constructive conflict behaviors and invest time and energy in problem-solving rather than personalizing disagreements.

Every leader has natural strengths and behaviors that can contribute to a safe and trusting environment. Every leader must learn to recognize and overcome the behaviors that threaten psychological safety and diminish trust. The training will introduce best practice methodologies for accelerating and sustaining healthy trust among EMS employees and volunteers.

InitiativeOne provides leaders with tools for creating healthy culture built upon trust. Once trust is in place, leaders can grapple with issues with confidence. The training will equip EMS leaders with clear and reproducible steps for creating healthy organizational cultures that will attract, develop and retain the best talent, whether the talent is volunteer or formally employed by the organization.

The capacity to move the EMS organization forward relies on the capacity of its leaders. A wise investment in leadership training correlates to forward momentum when the health and capacity of the leaders is improved. Our client research with leaders who have worked with InitiativeOne reveals that leaders can expect the following benefits:

1. Lower stress and anxiety.
2. Increased authenticity with themselves and others.
3. Healthier relationships with self, family and co-workers.
4. Improved mental and emotional energy.
5. Happier, enriched and integrated lives.
6. Clearer sense of purpose and increased meaning.
7. Deeper sense of respect and appreciation by company leaders.

### Shrinking Volunteers and High Attrition Rates

Many leaders within EMS face the challenge of shrinking volunteers or high attrition rates. Explain how these trainings will help mitigate these issues.

Fundamentally, employees and volunteers want to engage in meaningful work. They want to belong. The desire to belong and provide meaningful service is not directly dependent upon employee or volunteer status. As noted above, a relentless commitment to a healthy leadership culture will improve retention. An EMS organization that reinforces clarity of mission through words and actions will enhance trusting relationships in the organization and the communities where they serve. Therefore, mitigating the challenges of shrinking volunteers and high attrition rates begins with healthy leadership and ongoing culture creation.

In addition, EMS leaders encounter multiple generations of employees and volunteers in the workplace. In our work with multi-generational leaders, InitiativeOne has developed the expertise to help EMS leaders transform accountability from a punitive perspective into a positive exercise, one that reaches across generational differences and fosters respectful conversations and shared learning. Without these efforts to provide avenues for connection, generational differences can escalate attrition rates.

EMS leaders must be willing and able to put mission critical issues on the table in a respectful manner. They will need to lead open and honest discussions where volunteers and employees create deep engagement, ownership and a sense of belonging that transcends employment status. Rather than avoiding conflict or escalating destructive conflict, EMS leaders can learn how to accelerate trust through constructive conflict leadership.

InitiativeOne's training approach aligns with these key principles. The training begins with the PDP ProScan assessment. Leaders begin the journey toward improved self-awareness. This is the first step toward creating culture. Self-awareness provides a pathway for improved social-awareness. Improved awareness of self and others enables culture creation via the effective investment of skills and knowledge. These principles are aimed at enhancing the behaviors and elements of culture that mitigate turnover and attract the best people. The following are critical components of such a culture:

**Deep Respect is the Norm.** InitiativeOne will teach leaders how to develop behavioral norms that energize teams and yield deep respectful relationships. When initiated and practiced team norms move beyond rules or a list of agreements that are distanced from daily behaviors. When norms become a part of the daily practice, they create missional commitment and accountability. When volunteer organizations show and create an environment of **Deep Respect** for volunteers, individuals know they are valuable and appreciated.

**Information Flow is Healthy** - InitiativeOne will help leaders identify, clarify and share information throughout the EMS organization. When volunteers do not receive critical information or they do not receive it in a timely manner, they feel distanced and disengaged. InitiativeOne will help EMS leaders develop a common language and an efficient model for sharing critical information. Sometimes volunteers can feel distant from the deeper discussions, the heart of an organization. EMS leaders will learn the best practices for preventing any real or perceived lack of connection or lack of openness. InitiativeOne will share a model for prioritizing when, how and with whom to share information in order to create the most positive impact.

As noted above, the health and capacity of EMS leaders will have an impact on the health of the EMS organization. Healthy organizations attract and develop the best volunteers. Client research has revealed the correlation. Heightened levels of leadership have created the following results:

1. Higher attractiveness for top talent.
2. Improved innovation that leads to better solutions for your partners.
3. Reduced turnover.
4. Deeply engaged teammates.
5. Heightened accountability.
6. Increased ownership and responsibility for excellence.

## Resources for Participants

What, if any, resources are participants in these trainings given to help begin change within their organizations?

- Every Individual will receive an 18-page PDP ProScan assessment report.

- EMS Leadership Training Participants will receive a copy of *Is Everyone on the Bus?* By Fred Johnson and Paul Metler. This book provides a model for understanding different types of people in organizations and leading them more effectively and a guide for team discussion and positive implementation.
- Participants will receive Instructional models that will help them create a common language within the EMS organization and operationalize the learning.
- Every Supervisor will receive a copy of *The Reality of Change: Mastering Positive Change is Key to Extraordinary Leadership and Optimal Business Outcomes* by Fred Johnson and Paul Metler. The book provides a model for understanding and leading personal and organizational change.

## State Cost Proposal

---

*A completed cost proposal form follows this page.*

---